



STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

Working Title

Liquor Distribution Bureau Chief

Job Code Title

Program Manager II

Pay Band

7b

Job Code Number

111917

Liquor Control Division

Liquor Distribution Bureau

Fair Labor Standards Act

Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state agency liquor stores and administers the laws governing the sale, taxation, and licensing of alcoholic beverages and tobacco products; returns unclaimed property to its rightful owners; and determines how state taxes and liquor and tobacco laws apply to Indian Tribes and tribal members in Indian Country.

The Liquor Control Division administers the state's Alcoholic Beverage Code, which governs the control, sale, and distribution of alcoholic beverages. The division provides customer service with a focus on public safety to ensure a safe, orderly, and regulated system for the convenient distribution and responsible consumption of alcoholic beverages. The Liquor Control Division includes the Administrative Team, Liquor Distribution Bureau, and Liquor Licensing Bureau. The Liquor Distribution Bureau manages state wholesale liquor operations including warehouse shipping and receiving, accounts receivable and payable, inventory management, liquor order processing, agency contract management, and customer service.

Job Responsibilities

The Liquor Distribution Bureau Chief allocates financial and staff resources; plans and directs the programs and services of the bureau; administers bureau policies, administrative systems, operations, and budget; coordinates special projects; represents the department in appeals; and assists attorneys in legal proceedings. The incumbent manages the procurement and order fulfillment functions of the Liquor Control Division. The position reports to the division administrator and supervises bureau staff.

- **Staff Leadership, Management, and Supervision 40%**

Incumbent is responsible for leading staff and managing the day-to-day activities of the bureau. Responsibilities include monitoring the progress of work plans, goals, and objectives and aligning them with the department's goals and priorities. Supervision and development of staff is imperative to a manager's success.

Staff Leadership

1. Creates and maintains a high performance environment characterized by enthusiastic and positive leadership, direction, and a strong team orientation. Motivates employees to accomplish numerous division goals and objectives. Coordinates performance measures with staff. Encourages the development of new techniques or solutions to problems and assists with the resolution.

2. Readily adapts to changes in existing operations, programs, services, activities, and functions. Makes recommendations. Takes necessary action to implement or accommodate changes. Maintains a positive attitude in communication to staff even when difficult changes arise.
3. Maintains an atmosphere of safety within the bureau. Ensures adequate training for all staff in proper lifting techniques, sensible ergonomic practices, and work-specific safety opportunities.
4. Makes and accepts responsibility for decisions necessary to carry out the bureau's mission.
5. Accepts direction and feedback from supervisors and follows through appropriately.

Management

1. Conducts strategic planning in coordination with the division administrator to develop and establish short and long-range plans. Participates in development of viable goals and objectives consistent with agency priorities.
2. Develops programs, policies, and procedures to assure the citizens of Montana that the department operates in accordance with the highest standard of integrity and ethics.
3. Evaluates state and national standards; new trends and technologies; bureau needs; and other factors to integrate requirements and resources into program plans.
4. Establishes priorities, deadlines, and work plans for program activities. Evaluates workflow processes, efficiencies, and problems to identify the most effective use of staff and material resources to meet goals and objectives. Appropriately allocates resources to accomplish assigned work by coordinating with other work units and programs and adjusting subordinate assignments as needed. Considers pertinent factors such as available resources, staff ability, timelines, and work load. Identifies the need for additional staff or resources while maintaining fiscal responsibility.
5. Plans, schedules, and assigns special projects. Initiates adjustments to reflect changes in overall division and agency goals, operations, and relationships to departmental divisions.
6. Reviews and monitors progress through meetings and consultations. Conducts staff meetings, disseminates data, and promotes information exchange for support and advancement of department mission and goals. Uses input from the staff to guide program responsibilities.
7. Recommends program budgets for staff and equipment. Reviews allocations, project plans and objectives, and expenditures.
8. Identifies information needs and develops reports, information systems, spreadsheets, and other tracking methods to monitor program status, work progress, bureau performance, and individual performance. Uses data to identify areas of concern, strengths, and weaknesses. Provides analysis and recommends solutions to department management to resolve problems. Oversees quality control of information and sources.
9. Prepares correspondence in response to requests or inquiries. Ensures that necessary reports, correspondence, documentation, administrative actions, files, and records are correctly prepared, completed, maintained, and processed in accordance with applicable guidelines and time frames. Ensures the bureau follows department expectations regarding disclosure and employee confidentiality.

Supervision

1. Recruits and hires employees. Interviews applicants and makes appropriate selection recommendations according to applicable laws, rules, policies, procedures, and guidelines. Ensures proper training and orientation of new employees.
2. Establishes criteria for acceptable work behavior and performance. Promotes workplace efficiency and productivity by educating, mentoring, coaching, and correcting employee behavior. Encourages exceptional performance and improvement in areas of individual weakness. Develops and monitors corrective actions.
3. Appropriately reviews, recommends, and initiates personnel actions according to applicable policies, procedures, and guidelines. Carefully considers options available. Works with Human Resources to take appropriate disciplinary action as needed. Enforces disciplinary policies.

4. Recognizes and promptly resolves internal and external issues. Mediates personnel issues in a very timely manner.
5. Completes employee performance reviews. Defines goals and required results at the beginning of the performance review period. Communicates on a very regular basis with staff on progress toward those goals and results.
6. Determines the training needs of staff through analysis of program effectiveness, new technology and policies, and staff performance. Ensures consistency in the application of training opportunities for all staff. Develops and enhances on-the-job training opportunities to ensure staff is provided the needed training to fulfill their job duties including cross-training opportunities. Provides necessary information and tools to staff to complete any new tasks and duties
7. Communicates policy and procedures clearly and effectively in order to obtain desired results. Ensures staff adhere to rules, policies, procedures, and collective bargaining agreements.
8. Monitors and approves staff leave usage while ensuring adequate coverage is maintained.
9. Upholds and promotes the department's conviction to customer service throughout agency contacts as well as in communication with taxpayers. Staff is held accountable for providing the highest level of customer service to all those that they come into contact with.

- **Liquor Distribution Bureau Administration 25%**

1. Reviews bureau policy and evaluates the impact of changes in technology, state and federal requirements, and department operations.
2. Monitors performance of the bureau's procurement and distribution programs. Identifies areas for program improvement and methods to increase efficiency,
3. Develops program evaluation measures and analyzes bureau operations. Monitors the use of services, funding, and staff and assesses the need for additional staff and equipment. Develops and implements standards, policies, and procedures for the bureau.
4. Gathers input from the public, other governmental agencies, and bureau staff. Develops proposals for legislation or administrative rules. Presents proposals to the division administrator and may present them before the legislature. Writes legislative bills and fiscal notes. Testifies at the legislature on behalf of the department.
5. Monitors and analyzes the bureau budget on a monthly basis. Tracks program funding levels through accounting reports and approves expenditures. Directs the procurement, purchase, and inventory control of bureau equipment and supplies. Projects future expenditures and year-end balances; identifies areas of concern and discrepancy; and makes status reports to the division administrator to determine program budgetary actions.

- **Internal Controls, Auditing, Accounting 30%**

1. Develops, implements, and communicates policies, protocols, and standards for inventory control and facility security. Ensures that inventory and security systems are operating according to manufacturer's specifications, state regulations, and department policy. Provides training and guidance to division staff and managers on theft prevention; the proper use of building inventory and security systems; and the operation of the accounting and inventory applications on the department's integrated tax system (GenTax).
2. Establishes and oversees the maintenance of division documentation, recordkeeping systems, and information systems. Coordinates the development of electronic and paper data transfer, storage, and retrieval systems; ensures the compliance of project recordkeeping with applicable regulations and professional standards; and makes recommendations for the modification or enhancement of department and division accounting and inventory applications in GenTax.
3. Identifies and resolves customer service, product supply, and distribution accounting problems. Investigates complaints and problems. Evaluates physical inventory and division records to confirm problems with orders or shipments. Makes necessary accounting and inventory adjustments. Coordinates financial transactions such as issuing refunds and updating accounting systems.

4. Evaluates, establishes, and modifies internal controls required to maintain the integrity of liquor distribution accounting operations. Assesses the accounting and reporting requirements of the division. Analyzes fiscal policies to provide an adequate internal control structure to ensure compliance.
5. Coordinates and performs division inventory control to safeguard assets and provide accountability. Maintains perpetual inventory within the accounting system by maintaining and updating multiple inventory spreadsheets. Performs and oversees physical inventories by developing work plans, making and reviewing assignments, ensuring accountability, and making adjustments for confiscated liquor from closed stores, breakage, inventory errors, etc.
6. Develops audit guidelines, areas and approaches. Provides systematic approaches for evaluating business operations and formulating projects. Analyzes business processes and financial transactions in comparison to applicable standards and regulations. Develops recommendations to improve processes and maintain or achieve compliance. Prepares internal audit reports with recommendations to improve operations.
7. Evaluates and processes division accounting transactions and system reports to ensure the accuracy and proper recording of financial transactions. This includes reviewing distribution accounts and accounting reports for accuracy and reasonableness; monitoring monthly expenditures; authorizing and verifying monthly payments; and preparing monthly and annual reports on the liquor enterprise fund from liquor distribution and sales using data from multiple accounting systems.

• **Other Duties as Assigned 5%**

1. Performs other duties as assigned by the division administrator.

Job Requirements

To perform successfully as a bureau chief, the incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. Strong communication skills and the ability to communicate effectively and respectfully are required. The incumbent is required to analyze complex issues; identify others' underlying concerns and motives; deal with controversy and hostility in a professional and objective manner; establish effective relationships with others; and work effectively under pressure. Seasoned judgment in decision making is necessary since the work is performed with minimal guidance and within broad guidelines. It is essential that the incumbent has the ability to work independently but also as part of a team; maintain a high performance team; make sound decisions and be accountable for them; generate innovative ideas; and have personal initiative. The incumbent is expected to apply critical thinking skills; be a problem solver with the ability to identify and resolve tactical and strategic issues before they become problematic; resolve operational issues; elevate matters as necessary; recommend solutions; and effectively implement division changes and management directives. This position works with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job.

The incumbent must demonstrate professional knowledge of the principles and processes for providing customer and personal services including customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction. Knowledge of applicable state and federal regulations, statutes, and policies; public administration and management including strategic planning; project management; principles and methods of work planning; performance management including setting goals, objectives, and measures; operational and program planning; quality assurance methods; organizational development; project management; resource allocation; leadership techniques; governmental organizational structure, accounting, and budgeting; legislative and administrative rule processes and guidelines; and state and department policies, procedures, and precedents is required. The work also requires knowledge of computers and database management including state and department information systems (GenTax, SABHRS); data collection, analysis, and reporting techniques; compliance requirements and practices; customer service standards; business communications; records

management; state and federal funding requirements; agency policies, procedures, and guidelines; supervisory principles and practices; department and state personnel policies, procedures, and precedents; and employment law.

- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is a bachelor's degree in accounting, auditing, finance, economics, business, public administration, or related field and five years of job-related work experience including three years of direct supervisory and program management experience.
 - Work experience should include budgeting, licensing, and working knowledge of various tax types.
 - Other combinations of education and experience will be evaluated on an individual basis.

Department Core Values

- **Respect:** As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.
- **Integrity:** Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.
- **Productivity:** Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public, other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.
- **Teamwork:** Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

Working Conditions

This position has considerable mental stress and pressure due to supervisory issues; workload; conflicting, multiple priorities; critical projects with hard deadlines; time constraints; significance of decisions made; the challenging nature of contacts with taxpayers, elected officials, etc.; and coordination of all functions of the bureau. At times, the incumbent will deal with angry, hostile, and difficult individuals to resolve concerns or to bring about compliance with regulations. This may cause stressful work conditions and a high degree of mental stress. As a Department of Revenue employee, the incumbent may come into contact with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. Work hours may exceed 40 hours per week from time to time. Leading up to and during legislative sessions work hours routinely exceed 40 hours per week and may include working evenings and weekends. May involve minimal travel some which will be out-of-state therefore a valid Montana driver's license is required. This position requires considerable computer and keyboard use. The incumbent may spend considerable time on the phone. Lifting is infrequent, less than 15 pounds and includes carrying light items such as papers and books. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

Special requirements

- Background Examination: Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- Compliance with All Appropriate Montana Tax Laws: An employee's tax status must be current.

This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.

Division Administrator Review: The statements in this job profile are accurate and complete.

Signature: Shauna Helfert, Division Administrator Date: January 2013

Human Resource Director Review: The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resources Director Date: January 2013

Employee: My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: _____ Date: _____

Name (print): _____